

2010-2016 CAPITAL PLANNING SYSTEM USER MANUAL

Projects Appearing in Plans of Multiple Agencies (Form SYP-A4)

Upon choosing Form SYP-A4 from the **SELECT OPTION** page, a listing of all projects that the reporting agency has identified as appearing in plans of multiple agencies will be displayed, along with the biennium in which the project is proposed.

From this project listing, the user may take any of the following actions (the steps to do each operation are shown in *italics*)

- Retrieve the detailed data for a specific project to review and edit
 - *Select [Edit] on the project line*
- Add a new project and the accompanying detailed data
 - *Select [Add New Project] at the bottom of the page*
- View and/or print the detailed data for a single project
 - *Select [View] under the Reports column on the project line*

Note: Changes to the data or the deletion of an entire project in the listing can be done only by accessing the project form. Changes or deletions cannot be made directly to this listing.

NAVIGATING THE PROJECT LISTING

If there are more than 15 projects, they will be listed on multiple pages (15 projects per page). Up to 10 pages will be identified at the bottom of the screen of the selected page, click on the ellipse (. . .) to go to pages other than the 10 listed. The bottom of the page will also display the total number of pages and the current page number (Viewing page ___ of ___).

ENTERING DATA

To move between fields on Form SYP-A4, use the <Tab> key or the mouse.

After completing the data entry, selecting [Save Changes] will save the information to the database if all required data have been entered (see Required Data Fields below). The other option at this point is to [Cancel] which returns the user to the minor projects listing, without saving any new or changed data.

TYPES OF DATA

Data on Form SYP-A4 is comprised of selections from picklists, text, and numeric entries.

Yes/No.....Click to fill in the circle to the left of the Yes or No response. (If “yes,” be sure to complete the required narrative in the next field.)

Text.....Enter text as in a word processing application. Use the up and down arrows to view contents of the field. A Typing Progress Bar will show the character limit for that field and how close the user is to that limit as the narrative is being entered.

NumbersEnter figures with or without commas (,); commas will be inserted automatically. Select [Calculate] to generate and display totals.

DELETING A PROJECT

To delete a project, select [Edit] from the Form SYP-A4 listing then select [Delete] at the top of the project page. The user will be prompted to confirm that the intent is to completely remove the entry from the system.

REQUIRED DATA FIELDS

The Project Title must be entered before the system will accept the [Save Changes] instruction on Form SYP-A4.

Before the cabinet/agency contact can submit the completed agency plan to CPAB, the system will run a series of checks to ensure that all required data fields have been completed. The plan will not be submitted unless all required fields are completed. The following will be checked on Form SYP-A4:

- Has the Project Title field been completed?
- Has the Biennium field been completed?
- Have the other agency plans in which the project is listed and the corresponding project titles and biennia been identified?

PRINTING REPORTS

In addition to the ability to print data for individual projects from the listing. A summary report can be printed by choosing “View/Print Reports” under Agency Level Reports on the **SELECT OPTION** page.

All reports are provided in PDF, which requires the Adobe Acrobat Reader. (This software may be downloaded from the capital planning system **HOME** page.)